

ALLEGIANT PREP ACADEMY  
CHARTER SCHOOL



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**APPLICATION FOR CHARTER RENEWAL**

Respectfully submitted to the Indiana Charter  
School Board on October 20, 2022

Exhibit B

**Renewal Application Overview**

The applicant group's **designated representative** will serve as the contact for all communications, interviews, and notices from the ICSB regarding the submitted application.

**Charter School Name:** **Allegiant Prep Academy, Inc (DBA Allegiant Prep Academy)**

**Charter School Address:** 3125 Concord Ct., Suite B, Indianapolis, IN 46222

**Designated Representative and Contact**

**Information (Phone & Email):** **Rick Anderson, Founder & Head of School**  
[randerson@allegiantprep.org](mailto:randerson@allegiantprep.org) (317)489-6877

**Mission Statement:** Allegiant Prep Academy educates all students in grades K-8 with rigorous academics, character development, and a commitment to community necessary for college success and a life of positive action.

**School Leader/Principal:**

**Rick Anderson, Founder & Head of School**

Current Board of Directors	
Daniel Harting	Kendra Key
Brandon Lindsay	Aaron Laster
Marlon Llewellyn	Keeanna Warren

**Grade Levels and Student Enrollment**

Complete Tab 1 of either the Enrollment Plan for K-12 Schools or the Enrollment Plan for Adult High Schools, as applicable. Please ensure that you are completing the correct Enrollment Plan.

**Identify ESP or partner organization (if**

**applicable):**

**Phalen Leadership Academy (EVE) – Effective 2023-2024**

**SY** \_\_\_\_\_



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## EXECUTIVE SUMMARY

Allegiant Prep Academy Charter School (Allegiant Prep) is a college-prep charter school located in the Haughville Neighborhood on the Westside of Indianapolis. Founded in 2018 with 39 Kindergarten and First Grade Scholars, Allegiant Prep currently serves 145 Kindergarten – Fifth Grade children. We believe and are committed to developing the skills, mindsets, and habits necessary for our scholars to leverage a robust academic foundation that will allow them to define success and excel in school and life. Charged with ensuring our scholars are prepared to attend and successfully matriculate through college while guided by a moral compass that will inform sound judgment into adulthood.

Over the last several years, our commitment to ensuring adults and students are safe has allowed us to optimize learning time and instruction. Our core values (Respect, Integrity, Perseverance, Unity, and Responsibility) are not only communicated but internalized through explicit modeling and weekly scholar-led community meetings. This focus on respecting ourselves and others has allowed us to prioritize foundational reading and comprehension skills by allocating over 135 minutes daily to small-group literacy instruction. In addition to literacy, our scholars receive over 60 minutes of daily math instruction, including an adaptive computer component that allows scholars to work towards mastering standards and remediating underdeveloped skills.

As we have experienced 300% growth over the last four years, we also recognize the need for school programming and support to expand. Our awareness and responsibility to ensure our families continue to receive an excellent education that will afford them:

- more diverse life experiences
- access to additional academic and life supports
- wrap-around services for scholars and families
- organizational and operational supports

Our request to join Phalen Leadership Academies is an investment in the future of our organization to accelerate the pace and scale of student achievement while leveraging network-level support. As we transition from founding to sustaining the excellent and urgent work of ensuring each scholar that enters our doors leave ready for college success and a life of positive action.

With a profound level of responsibility and vigor, we are committed to serving our community on the Westside of Indianapolis for now, next year, and in years to come.

**Allegiant Prep Academy** educates all students in grades K-8 with rigorous academics, character development, and a commitment to community necessary for college success and a life of positive action.





## SECTION I: PERFORMANCE REVIEW

In section I, the school should address each performance category or subcategory in the Summary in which the school received a rating of "Approaches Standard," "Improvement Necessary," or "Does Not Meet Standard," focusing primarily but not exclusively on the school's most recently completed school years.

### Category 1: Financial Accountability Metrics

**2019 Days Cash on Hand. DOES NOT MEET STANDARD**

**2019 Primary Reserve Ration. DOES NOT MEET STANDARD**

**2019 Change in Net Assets Margin. DOES NOT MEET STANDARD**

**2019 Debt Service Coverage Ratio. DOES NOT MEET STANDARD**

**2020 Primary Reserve Ration. DOES NOT MEET STANDARD**

**2020 Change in Net Assets Margin. DOES NOT MEET STANDARD**

### Root Cause Analysis

The overall arch of the financial accountability metrics is a very positive story for APA. It took only three years of operation to meet the standard in all metrics. The key to that was the focus on the two metrics that have to be achieved to grant stability to a start-up organization. Those two are days cash on hand and debt to asset ratio. As you see the improvement in both of those metrics over the first three years, the others also begin to fall in line.

APA did not meet the standard in each of the metrics listed for 2019 because it was year one, and enrollment was 39. Small enrollment in our start-up year did not allow us to meet financial metrics. The great news is that APA managed its resources well, focusing on cash and debt. The \$325K start-up funding from Walton sustained APA through year one. In a bit of an accounting technicality, if the \$325K were received in July 2018 instead of January 2018, APA would have met the standard in the change in the net assets margin line.

In 2020, APA improved its cash position, managed its debt, and increased enrollment. Those things allowed APA to meet the standard in almost all metrics. The primary reserve ratio and net asset margin change improved due to the cash/debt improvements, but the progress didn't rise to the meets standard category until 2021.

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## **Category 2: Grade Level Proficiency on Indiana Academic state assessments compared with the previous school year.**

### **1.4a – Grade level proficiency on ELA state assessment. DOES NOT MEET STANDARD**

#### **Root cause analysis**

**Curriculum:** During the last two years (20-21 and 21-22 SY), the quality of instruction children have received has been negatively impacted due to the disruption of the COVID-19 Pandemic. Despite this, as a school, some considerable gaps in ELA Curriculum further accelerated low scholar proficiency on the ILEARN ELA assessment in the Spring of 2021 and 2022. In our first four years of operation, Allegiant Prep refined and supplemented a handful of curriculums that did not provide the rigor required by state standards, was misaligned, and lacked cohesion. We recognized an opportunity to adopt a new ELA Curriculum, but due to size, we lacked the financial capacity to make this switch in our first few years of existence. As a result, teachers did not have a scope & sequence that provided a direct connection to ELA state standards to be assessed on the 3<sup>rd</sup> Grade ILEARN Assessment. As a result, scholars did not experience the rigor required by each standard in class each day consistently.

**Internal Assessment:** During the first four years of operation, Allegiant Prep has utilized the STEP (K-4 Literacy Assessment) and the NWEA MAP Assessment(s) (ELA/Math growth). While these two assessments are rigorous and provide reliable growth and proficiency data. APA lacks an Upper Academy (3-5) assessment that mirrors the rigor and format (i.e., scholars getting extensive at-bats at Reading and responding to longer passages via technology) of the ILEARN Assessment.

**Leadership Capacity/Expertise:** While APA has always committed to prioritizing additional time for ELA instruction and dedicated at least three whole days in the academic calendar for assessment analysis, we have lacked a consistent leader charged with owning the implementation and evaluation of our educational program. In SY21 and SY22, we had a Dean of Curriculum and Instruction for a little over a year, but due to affordability and the uncertainty of the Pandemic relied on a third party to provide remote observation and feedback to teachers during the 21-22 SY. While this helped to ensure teachers were receiving targeted feedback, it lacked the depth and differentiation needed to adequately prepare scholars to excel on state testing in the Spring.

#### **Plan of Action**

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**Curriculum Adoption:** In our first four years of operation, Allegiant Prep has refined and supplemented a handful of ELA curriculums that did not always provide the rigor required by state standards, were misaligned, and lacked cohesion. Our most significant area of opportunity was the need to purchase and operationalize a rigorous, standard-aligned ELA Curriculum. This school year, we bought the Insights Humanities Curriculum (i.e., Writing, Reading, and Close Reading) through Lavinia Group. Over the next eight months, we will leverage their support to provide staff with continuous implementation and planning feedback. Unlike our first four years of operation, we now have a rigorous and aligned ELA curriculum that we will continue to execute in our next charter term. To ensure scholars build the skills necessary to match the rigor of state standards and ultimately increase the number of students reaching proficiency on the Indiana English Language Arts State Assessment each year.

**Leadership Capacity/Expertise:** This year, we hired a Head of School Fellow, with one of their major tasks supporting the implementation, feedback/observation, and Upper Academy (3-5) preparation for state testing in the Spring. As we move into our second term (23-24 SY), we will hire an upper Dean of Curriculum and Instruction. Their primary responsibility will be teacher observation/feedback, alignment of in-class instruction, and Indiana State Standards. The priority is increasing the percentage of scholars who are proficient on the ELA ILEARN Assessment year over year.

**Timeline:** This current school year is our first year of adopting the Insights Humanities Curriculum. This comprehensive and aligned curriculum, coupled with human capital, will provide consistent expertise and support. We are confident that starting this school year, we will see an increase in proficiency on the ELA ILEARN Assessment year over, increasing Mastery by 10% each year.

**1.4b – Grade level proficiency on Math state assessment compared with the previous school year. DOES NOT MEET STANDARD**

## **Root cause analysis**

**Curriculum:** During the 20-21 SY, in our 3<sup>rd</sup> year of operations, we shifted from an out-of-state adopted curriculum to Zearn. This provided teachers and scholars with a rigorous and aligned curriculum with small group math instruction that also provided student-facing computer adaptive element that allowed scholars to practice skills that had yet to be mastered within the Math Block each day. This was our first year of state testing with a new Math curriculum that was aligned. Still, as a school, we could not provide our instructional staff with the training, support, and best practices in intellectual prep and planning for intentional moments for scholars to explain thinking and rationale to support strategies being used in class each day.

**Leadership Capacity/Expertise:** While APA has always committed to prioritizing additional time for Math instruction and dedicated at least three whole days in the academic calendar for assessment

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analysis, we have lacked a consistent leader charged with owning the implementation and evaluation of our educational program. In SY21 and SY22, we had a Dean of Curriculum and Instruction for a little over a year, but due to affordability and the uncertainty of the Pandemic relied on a third party to provide remote observation and feedback to teachers during the 21-22 SY. While this helped to ensure teachers were receiving targeted feedback, it lacked the depth and differentiation needed to adequately prepare scholars to excel on state testing in the Spring.

## **Plan of Action**

**Leadership Capacity/Expertise:** This year, we hired a Head of School Fellow, with one of their major tasks supporting the implementation, feedback/observation, and Upper Academy (3-5) preparation for state testing in the Spring. As we move into our second term (23-24 SY), we will bring on an upper Dean of Curriculum and Instruction whose primary responsibility will be teacher observation/feedback, alignment of in-class instruction and Indiana State Standards, and increasing the percentage of scholars year over a year who are proficient on the Math ILEARN Assessment.

**Timeline:** This is our second full year of using the Zearn Math Curriculum. We are confident in the rigor and alignment to Indiana Academic State Standards. Teachers have received extensive training on pushing scholars to demonstrate their thinking during the Math block, and scholars actively engage in the demand of grade-level standards. With this foundation in place, we are confident that starting this school year, we will begin to see an increase in proficiency on the Math ILEARN Assessment year over year, to increase Mastery by 10% each year.

### **1.4c – Grade level proficiency on English Language Arts state assessment compared with the traditional school corporation. DOES NOT MEET STANDARD**

## **Root cause analysis**

The same gaps in the curriculum, consistent internal expertise, and teacher support shared in the root cause analysis section above have also impacted our ability to demonstrate significant grade level proficiency in comparison to other traditional school corporations in ELA.

**Curriculum:** During the last two years (20-21 and 21-22 SY) the quality of instruction children have received has been negatively impacted due to the disruption the COVID-19 Pandemic. Despite this, as a school, there were some considerable gaps in ELA Curriculum that further exacerbated low scholar proficiency on the ILEARN ELA assessment in the Spring of 2021 and 2022. In our first four years of operation, Allegiant Prep refined and supplemented a handful of curriculums that did not provide the rigor required by state standards and were misaligned and lacked cohesion. We recognized there was an opportunity to adopt a new ELA Curriculum, but due to size lacked the financial capacity to make this switch in our first few years of existence. As a result, teachers did not have a scope & sequence that provided a direct connection to ELA state standards to be assessed on the 3<sup>rd</sup> Grade ILEARN Assessment,

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consequentially scholars did not experience the rigor required by each standard in class each day on a consistent basis.

**Internal Assessment:** During the first four years of operation, Allegiant Prep has utilized the STEP (K-4 Literacy Assessment) and the NWEA MAP Assessment(s) (ELA/Math growth). While these two assessments are rigorous and provide reliable growth and proficiency data. APA lacks an Upper Academy (3-5) assessment that mirrors the rigor and format (i.e. scholars getting extensive at-bats at Reading and responding to longer passages via technology) of the ILEARN Assessment.

**Leadership Capacity/Expertise:** While APA has always had a commitment to prioritizing additional time for ELA instruction and dedicated at least three whole days on the academic calendar for assessment analysis, we have lacked a consistent leader charged with owning the implementation and evaluation of our academic program. In SY21 and SY22, we had a Dean of Curriculum and Instruction for a little over a year, but due to affordability and the uncertainty of the Pandemic relied on a third party to provide remote observation and feedback to teachers during the 21-22 SY. While this helped to ensure teachers were receiving targeted feedback, it lacked the depth and differentiation needed to adequately prepare scholars to excel on state testing in the Spring.

**Timeline:** This current school year is our first year of adopting the Insights Humanities Curriculum. With this comprehensive and aligned ELA curriculum, coupled with human capital that will provide consistent expertise and support, we are confident that starting this school year we will start to see an increase in proficiency on the ELA ILEARN Assessment year over year, with a goal of increasing proficiency by 10% each year.

## **Plan of Action**

**Curriculum Adoption:** In our first four years of operation, Allegiant Prep has refined and supplemented a handful of ELA curriculums that did not always provide the rigor required by state standards, were misaligned and lacked cohesion. Our biggest area of opportunity was the need to purchase and operationalize a rigorous, standard aligned ELA Curriculum. This school year we purchased the Insights Humanities Curriculum (i.e. Writing, Reading and Close Reading) through Lavinia Group and over the next 8 months will be leveraging their support to provide staff with continuous implementation and planning feedback. Unlike our first four years of operation, we now have a rigorous and aligned ELA curriculum that we will continue to execute in our next charter term, with the goal of ensuring scholars are building the skills necessary to match the rigor of state standards and ultimately increase the number of students reaching proficiency on the Indiana English Language Arts State Assessment each year.

**Leadership Capacity/Expertise:** This year we hired a Head of School Fellow, with one of their major tasks being, supporting the implementation, feedback/observation and Upper Academy (3-5)

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preparation for state testing in the Spring. As we move into our second term (23-24 SY) we will have an upper Dean of Curriculum and Instruction whose primary responsibility will be teacher observation/feedback, alignment of in class instruction and Indiana State Standards, and increasing the percentage of scholars year over year who are proficient on the ELA ILEARN Assessment.

**Timeline:** This current school year is our first year of adopting the Insights Humanities Curriculum. With this comprehensive and aligned curriculum, coupled with human capital that will provide consistent expertise and support, we are confident that starting this school year we will start to see an increase in proficiency on the ELA ILEARN Assessment year over year, with a goal of increasing proficiency by 10% each year.

#### **1.4.d – Grade level proficiency on Math state assessment compared with traditional school corporation. DOES NOT MEET STANDARD**

#### **Root cause analysis**

The same gaps in curriculum, consistent internal expertise and teacher support shared in the root cause analysis section above have also impacted our ability to demonstrate significant grade level proficiency in comparison to other traditional school corporations in Math.

**Curriculum:** During the 20-21 SY, in our 3<sup>rd</sup> year of operations we shifted from an out of state adopted curriculum to Zearn. This provided teachers and scholars with a rigorous and aligned curriculum that provided teachers with small group math instruction that also provided student facing computer adaptive element that allowed scholars to practice skills that had yet to be mastered within the Math Block each day. This was our first year of state testing with a new Math curriculum that was aligned, but as a school we did not have the capacity to provide our instructional staff with the training, support and best practices in regards to intellectual prep and ensuing intentional moments for scholars to explain thinking and rationale to support strategies being used in class each day.

**Leadership Capacity/Expertise:** While APA has always had a commitment to prioritizing additional time for Math instruction and dedicated at least three whole days in the academic calendar for assessment analysis, we have lacked a consistent leader charged with owning the implementation and evaluation of our academic program. In SY21 and SY22, we had a Dean of Curriculum and Instruction for a little over a year, but due to affordability and the uncertainty of the Pandemic relied on a third party to provide remote observation and feedback to teachers during the 21-22 SY. While this helped to ensure teachers were receiving targeted feedback it lacked the depth and differentiation needed to adequately prepare scholars to excel on state testing in the Spring.

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**Leadership Capacity/Expertise:** This year we hired a Head of School Fellow, with one of their major tasks being supporting the implementation, feedback/observation and Upper Academy (3-5) preparation for state testing in the Spring. As we move into our second term (23-24 SY), we will bring on an upper Dean of Curriculum and Instruction whose primary responsibility will be teacher observation/feedback, alignment of in class instruction and Indiana State Standards, and increasing the percentage of scholars year over year who are proficient on the Math ILEARN Assessment.

**Timeline:** This is our second full year of using the Zearn Math Curriculum. We are confident in the rigor and alignment to Indiana Academic State Standards. Teachers have received extensive training on pushing scholars to demonstrate their thinking during the Math block and scholars are actively engaging in the demand of grade level standards. With this foundation in place, we are confident that starting this school year we will start to see an increase in proficiency on the Math ILEARN Assessment year over year, with a goal of increasing proficiency by 10% each year.

**1.4.g – Percentage of students achieving proficiency on the IREAD-3 state assessment. DOES NOT MEET STANDARD**

## **Root cause analysis**

2021 was the first year our 3<sup>rd</sup> Grade scholars took the IREAD 3 Assessment. For context, this was our smallest cohort of scholars (9 students) with over 70% of these scholars being at Allegiant Prep for less than two years and the average scholar arriving more than a year behind in Reading. While the majority of these scholars grew at least one year in Reading per our STEP assessment, we needed more time to ensure they had mastered all K-2 literacy foundational skills assessed on the IREAD-3 Assessment in the Spring of 2021.

## **Plan of Action**

Our K-2 foundational literacy skill instruction (i.e. phonics) is working for the majority of our scholars, this is evident with the over 30% increase in proficiency (2021, 50% ---- 2022, 83%) on the IREAD-3 Assessment during this past school year where the majority of our 3<sup>rd</sup> Grade scholars during the 21-22 SY have been enrolled with us since Kindergarten.

**1.6a – Proficiency on the state assessment in English Language Arts for each subgroup compared with traditional school corporation. DOES NOT MEET STANDARD**

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## Root cause analysis

The same gaps in curriculum, consistent internal expertise and teacher support shared in the root cause analysis section above have also impacted our ability to demonstrate significant grade level proficiency for all scholars, including subgroups on the ELA ILEARN Assessment.

**Curriculum:** During the last two years (20-21 and 21-22 SY) the quality of instruction children received has been negatively impacted due to the disruption the COVID-19 Pandemic. Despite this, as a school, there were some huge gaps in ELA Curriculum that further exacerbated low scholar proficiency on the ILEARN ELA assessment in the Spring of 2021 and 2022. In our first four years of operation, Allegiant Prep refined and supplemented a handful of curriculums that did not provide the rigor required by state standards and were misaligned and lacked cohesion. We recognized there was an opportunity to adopt a new ELA Curriculum, but due to size lacked the financial capacity to make this switch in our first few years of existence. As a result, teachers did not have a scope & sequence that provided a direct connection to ELA state standards to be assessed on the 3<sup>rd</sup> Grade ILEARN Assessment, consequentially scholars did not experience the rigor required by each standard in class each day on a consistent basis.

**Internal Assessment:** During the first four years of operation, Allegiant Prep has utilized the STEP (K-4 Literacy Assessment) and the NWEA MAP Assessment(s) (ELA/Math growth). While these two assessments are rigorous and provide reliable growth and proficiency data. APA lacks an Upper Academy (3-5) assessment that mirrors the rigor and format (i.e. scholars getting extensive at-bats at Reading and responding to longer passages via technology) of the ILEARN Assessment.

**Leadership Capacity/Expertise:** While APA has always had a commitment to prioritizing additional time for ELA instruction and dedicated at least three whole days in the academic calendar for assessment analysis, we have lacked a consistent leader charged with owning the implementation and evaluation of our academic program. In SY21 and SY22, we had a Dean of Curriculum and Instruction for a little over a year, but due to affordability and the uncertainty of the Pandemic relied on a third party to provide remote observation and feedback to teachers during the 21-22 SY. While this helped to ensure teachers were receiving targeted feedback, it lacked the depth and differentiation needed to adequately prepare scholars to excel on state testing in the Spring.

**Lack of Additional Literacy Supports for ELL Learners during foundational years:** Due to our size, we were unable to bring on additional literacy instructional supports for our growing population of ELL scholars until the 21-22 SY.

## Plan of Action

**Curriculum Adoption:** In our first four years of operation, Allegiant Prep has refined and supplemented a handful of ELA curriculums that did not always provide the rigor required by state standards, were misaligned and lacked cohesion. Our biggest area of opportunity was the need to purchase and

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operationalize a rigorous, standard aligned ELA Curriculum. This school year we purchased the Insights Humanities Curriculum (i.e. Writing, Reading and Close Reading) through Lavinia Group and over the next 8 months will be leveraging their support to provide staff with continuous implementation and planning feedback. Unlike our first four years of operation, we now have a rigorous and aligned ELA curriculum that we will continue to execute in our next charter term, with the goal of ensuring scholars are building the skills necessary to match the rigor of state standards and ultimately an increase in students reaching proficiency on the Indiana English Language Arts State Assessment each year.

**Leadership Capacity/Expertise:** This year we hired a Head of School Fellow, with one of their major task being supporting the implementation, feedback/observation and Upper Academy (3-5) preparation for state testing in the Spring. As we move into our second term (23-24 SY) we will an upper Dean of Curriculum and Instruction whose primary responsibility will be teacher observation/feedback, alignment of in class instruction and Indiana State Standards, and increasing the percentage of scholars year over year who are proficient on the ELA ILEARN Assessment.

**Additional ELL Supports:** This year, we contracted with a third party that provides direct support to teachers to ensure ELL compliance and instructional supports. In addition to weekly small group ELA instruction pull outs, we have also invested in an EL computer adaptive curriculum that the majority of our ELL scholars utilize at least 3 days a week to further develop and accelerate foundational literacy skills that will allow them to better access grade-level standards and content.

**Timeline:** This current school year is our first year of adopting the Insights Humanities Curriculum. With this comprehensive and aligned curriculum, coupled with human capital that will provide consistent expertise and support, we are confident that starting this school year we will start to see an increase in proficiency on the ELA ILEARN Assessment year over year, with a goal of increasing proficiency by 10% each year.

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## SECTION II: SCHOOL IMPROVEMENT

In Section II, the school should describe how it will sustain success and/or continue to improve over the next charter term. Responses should demonstrate that the school is planning carefully and strategically for the future and has the capacity to achieve long-term success. The school should also detail the school's plans for the next charter term. Specifically:

- (1) Describe the school's plans and strategies for sustaining and continuing to build academic, organizational, and operational success over the next charter term. Explain how the school will build and achieve long-term sustainability and success in: a. The governing board; b. The leadership team; c. The teaching staff; and d. Academic achievement. In describing these strategies for sustaining success, please specify implementation timelines or timeframes as well as the responsible individuals or parties.
- (2) Identify weaknesses, challenges, and areas for improvement, and detail the school's plans for addressing each of these needs. Responses here should demonstrate that the school has reflected honestly and critically on those areas in need of improvement and ways to improve in those areas. In describing these plans and strategies for ongoing improvement, specify implementation timelines or timeframes as well as responsible individuals or parties.
- (3) Present any additional evidence, beyond the data contained in the final performance report for the charter school, supporting the school's case for renewal.
- (4) Please provide, as Attachment 1, a detailed five-year Pro-forma budget for the school, including the current school year, by completing ICSB's Budget Projections Workbook.
- (5) Please provide, as Attachment 2, a detailed budget narrative providing a high-level summary ICSB Charter Renewal Application Page 10 of the budget and how the budget aligns with the five-year business plan. The budget narrative should clearly describe assumptions and revenue estimates, including but not limited to the basis for per-pupil revenue projections, staffing levels, facilities expenses, and technology costs.
- (6) Please provide, as Attachment 3, a single complete Statement of Assurances form, attached hereto as Exhibit C, signed by an authorized representative of the applicant group.

### Governing Board

Allegiant Prep Academy's Board is deeply committed to our mission and comprised of a diverse group of professionals inspired by the responsibility of providing the school with sound Governance and Oversight. In addition to a sense of urgency to ensure Allegiant Prep continues to equip and inspire scholars and families, each Board Member has leveraged personal and professional expertise (Law, Finance, Real Estate, Accounting, Education) that has afforded the school stability in the first term of the Charter Agreement. Allegiant Prep Academy has been intentional about recruiting and retaining Board

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Members that not only reflect the families we serve (Over 96% of our population identify as students of Color), but also ensuring at least one member is a resident in the Haughville Neighborhood. Having a community member present on the Board ensures the school has kept its ear to the rail in regards to issues that impact the larger community beyond our four walls.

**Figure 1 SY 22 Board Member Expertise**

Board member	Area of Expertise
C. Daniel Harting, Associate, Barnes & Thornburg LLP	Law, Board Governance
Kendra Key, Legal Counsel, South Bend Community School Corporation	Education, Governance, Accountability, Strategic Planning
Brandon Lindsey, CPA CEO at Lindsey Tax	Finance, Operations
Aaron Laster, Founder & Managing Partner, RL Holdings LLC	Real Estate, Finance, Project Management
Marlon Llewellyn, Director of Recruitment and Strategic Partnership, Klipsch Educators College at Marian University Indianapolis	Education, Strategic Planning, Talent, Enrollment
Keeanna Warren, Associate Executive Director , Purdue Polytechnic High School	Education, Data Analysis, Assessment, School Leadership

The Allegiant Prep Board meets monthly or bi-monthly, with standing committee meetings each month (Governance, Academic Achievement, and Finance & Facility). Each Board Member serves on at least on committee.

### Leadership Team

Allegiant Prep has benefited from having consistent leaders who have been persistent in operationalizing high expectations and supports staff and students over the life of our current Charter Term. This team is responsible for operations, instructional coaching and professional development, school – wide culture, family supports, and ensuring adults and students feel empowered and psychologically safe each day.

**Rick Anderson, Founder & Head of School:** Rick brings a breadth of education administration experience back to his hometown of Indianapolis. After a couple of years in corporate America immediately following college, Rick felt a need to redirect his career toward his true interest – youth empowerment.

Rick served as the Dean of Students at Freedom Preparatory Academy, in Memphis, TN, after spending time teaching first and sixth grade. As Dean, he developed and implemented a schoolwide culture and [Allegiant Prep Academy](#) educates all students in grades K-8 with rigorous academics, character development, and a commitment to community necessary for college success and a life of positive action.



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behavioral standard. In addition, he coached novice educators, communicated with students' families, and devised professional development objectives for the faculty. Rick's next step at Freedom Preparatory Academy was as Head of School at the middle school, then Head of School at the elementary school shortly thereafter. In these roles, he led 60 teachers and over 750 students. With this experience under his belt, in 2016 Rick completed the BES Fellowship which afforded him the opportunity to visit north of 50+ high performing schools across the country. Rick study Business and earned his Bachelor of Science from Florida A&M University, and a Master's of Education from Christian Brothers University.

**Lydia Glover, Elementary Chair/Third Grade Teacher:** Lydia is in her fourth year at Allegiant Prep Academy. She has served as the Lead Kindergarten Teacher, Lead First Grade Teacher, and Elementary Chair for two years and is now the Lead Third Grade Teacher. Lydia entered education after graduating from Xavier University with a Bachelor of Arts degree in Philosophy, Politics, and the Public. She did The New Teacher Project's local transition to teaching program, Indianapolis Teaching Fellow. Through this program, she earned her Master of Arts in Teaching through Marian University. Through working closely with the leadership team at Allegiant Prep, Lydia was inspired to continue her education at Butler University through their Experiential Program for Preparing School Principals. Lydia has supported over a hundred scholars, coached novice teachers, developed professional development opportunities for our staff, and worked closely with different stakeholders in our immediate community.

**Sequoia Anderson, Director of Operations:** Sequoia brings several years of school operations experience at a network and independent Charter School level. After completing Teach For America in Memphis, she leveraged her knack for creating systems as the 8<sup>th</sup> Grade Level Chair to apply to not just her classroom, but to her entire team. From In 2014 – 2016, she served as the Operations Manager of Freedom Prep Academy's K-5 and 6-8 Middle School and was responsible for: vendor management, contractors, compliance, the nutrition program and day-to-day school wide systems. Sequoia has supported Allegiant Prep since its inception and brings a skill set coupled with institutional knowledge and relationships that has enabled to school to operate from our founding years to where we currently are today. Sequoia studied History and earned her degree from Spelman College, and a Master's of Education from Christian Brothers University.

Allegiant Prep is excited to be expanding the leadership team during the 23-24 School Year to include and Upper and Lower Academy Dean, charged with daily student/ staff support and adding an additional layer of ongoing professional development with the goal of accelerating student achievement.

## **Staffing - Recruitment & Hiring**

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Though the education pipeline has been disrupted over the last few years due to several reasons, one most noted is the Pandemic. Through a rigorous interview process that includes multiple stages that intend to allow candidates and hiring managers multiple methods of assessing the skills, mindsets, and habits necessary to be effective at teaching or leading. Despite several schools across the city, state and country struggling to fill vacancies we are currently 93% staffed for the current year. In addition to partnering with local and national talent organizations to provide access to high-quality educational talent, we are intentional about creating a work environment that is safe and predictable so that practitioners can hone and develop skills necessary to provide an exceptional education to scholars that we are responsible for serving.

## **Coaching and Development**

Allegiant Prep Academy invests in 3 full weeks of Professional Development with new and returning staff each Summer. Summer and ongoing professional development is facilitated by a diverse group of people including the Head of School Fellow, Grade Level Chairs, and Contracted Instructional Consultants. We invest significant time and resources to ensure teachers have access to supports that allow them to feel supported, developed and ultimately accountable for the academic Mastery and progress of their children. In addition, our school and teacher leaders receive extensive training on core curriculum, which includes: Zearn (Math), Insights (ELA – Shared Reading, Writing, Read Aloud, Humanities), Reading Mastery (phonics) and Footprints (Guided Reading). Teachers are observed at least twice a month with subsequent feedback meetings grounded in practice. Each Friday Teachers have two hours of Professional Development which focuses on one of the areas below each month: student data analysis and action planning, staff training and teacher planning time. Additionally, we have 3 full days during the year without scholars dedicated to Data analysis and action planning. These days are after interim assessment windows and give teachers and instructional leadership time to look at student data and make adjustments to instructional plans moving forward.

Allegiant Prep has a culture of “anyone on the team can receive feedback”. Administrators lead from a place of authenticity and vulnerability, that ensures mindsets are always open to receiving and implementing feedback.

## **Teacher Retention & Sustainability**

Teacher Retention is the number one factor that leads to continuous improvement and building institutional expertise that can be operationalized into systems that create the consistency necessary for scholars and families. Allegiant Prep’s first priority is to ensure people feel seen, heard, supported and respected as humans in work that can at times feel daunting and overwhelming. Our bi-weekly observation and feedback schedule and Friday PD are the primary vehicles that we use to develop staff and drive improvements in instructional execution.

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We also understand that respect for people's time and trust can be important in someone's decision to stay or leave. We intentionally have one Friday a month where teachers have the autonomy to choose to work remote, or from school during Friday PD. When people feel respected and trusted as professionals, they take advantage of the time they have for themselves. This remote PD option is always the last Friday of the month, so staff are able to plan accordingly. Many adults are able to get the work done in preparing for the upcoming week and have time left (or the entire time) to re-invest in themselves by disconnecting and recharging their batteries.

Making this work more sustainable for individuals is a huge priority in the next term of our charter agreement. We leverage participative leadership to empower staff to provide ideas or solutions to address barriers that can impede on the quality of work during bi-weekly check-ins.

## **Academic Achievement**

While the last two years of the COVID – 19 pandemic has disrupted how teachers teach and scholars learn that has resulted in larger percentages of children not being on grade level, at Allegiant Prep we are not using this as an excuse. There are some significant data points in our first two years of state testing that give us promise that each year we can continue to increase the number of scholars proficient in Reading and Math in comparison to Center Township and state test averages as we move into the next charter term.

## **Assessments**

Allegiant Prep uses a variety of assessments to ensure teachers have reliable data to gauge standards and skills that scholars have yet to master and ensure each child is receiving targeted academic interventions during the course of the day. We have used the NWEA – MAP assessment, a nationally normed assessment, at the beginning, middle and end of year to provide use with overall growth in ELA and Math. An area of opportunity that the leadership team is currently charged with for the 23-24 School Year is looking to add or replace this Assessment with an assessment that better mirrors the state assessment and helps to better inform instruction.

Allegiant Prep Academy uses STEP (Strategic Teaching and Evaluation of Progress) four times yearly to gauge and respond to K-4 grade level literacy skills that have not yet been mastered. This Assessment is administered one-on-one and provides educators with literacy data that can be analyzed and operationalized into instructional plans during small guided Reading and phonics instruction. We have been using this Assessment since our founding year, 2018.

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We have a huge opportunity in the next Charter Term to continue leveraging these assessments, but will also be exploring the introduction of a more ILEARN aligned literacy assessment like the iReady and standard aligned math interim assessment that we can use to better track content mastery outside of curriculum and the Math NWEA MAP assessment.

## **Academic Progress**

While Allegiant Prep Academy has experienced a disruption to student learning and achievement due to the last few years of the Pandemic, we have a handful of indicators from our first year of state testing (20-21 – Outperformed local school district on 3<sup>rd</sup> Grade Math ILEARN Proficiency) and this past school year (21-22 – 83% of APA scholars passed IREAD 3 Assessment) that give us confidence that we will be able to meet student achievement academic goals in the next charter term. While there is not a section to share growth data during the 21-22 SY, 60% of our scholars met or exceeded observed growth in Math on the NWEA MAP Assessment.

(2) Identify weaknesses, challenges, and areas for improvement, and detail the school's plans for addressing each of these needs. Responses here should demonstrate that the school has reflected honestly and critically on those areas in need of improvement and ways to improve in those areas. In describing these plans and strategies for ongoing improvement, specify implementation timelines or timeframes as well as responsible individuals or parties.

### **Focus Area #1: Human Capital/Capacity**

Due to starting off with 39 scholars during the 18-19 School Year, Allegiant Prep has had to go without classroom supports (i.e., co-teachers) and school wide supports (instructional leads) that are critically important to having the capacity needed to execute on our academic model. As a result (outside of the COVID -19 pandemic) our student achievement results have been inconsistent and there is a huge opportunity moving forward to leverage a full staff to ensure there is continuous improvement on state assessments each year. We are currently 93% staffed and per our 5-year budget projections, over the next 5 years and beyond will be able to sustain having a full leadership and instructional staff to execute our instructional model in a way that we have not been able to do in the last four years.

### **Focus Area #2: Curriculum Rigor and Alignment**

In our first four years of operation Allegiant Prep has refined and supplemented a handful of curriculums that did not always provide the rigor required by state standards, were misaligned and lacked cohesion. During the 20-21 School Year we adopted Zearn, our math curriculum that we have worked over the last few years to ensure that scholars are practicing Math skills that reflect the rigor of the grade level

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standards. Our biggest area of opportunity was the need to purchase and operationalize a rigorous, standard aligned ELA Curriculum. This school year we purchased the Insights Humanities Curriculum (i.e. Writing, Reading and Close Reading) through Lavinia Group and over the next 8 months will be leveraging their support to provide staff with continuous implementation and planning feedback. Unlike our first four years of operation, we now have a rigorous and aligned Math and ELA curriculum that we will continue to execute in our next charter term, with the goal of ensuring scholars are building the skills necessary to match the rigor of state standards and ultimately more students reaching proficiency on Indiana State Assessments.

### SECTION III: PROPOSED CHANGES

In this section, please specify any changes the school would like to see in any of the material terms in the Charter Agreement. Please note that any request for a material change, such as switching service providers, school location, grade configuration, etc., may result in a request for supplemental information from ICSB staff.

#### **Allegiant Prep Academy Acquisition**

Allegiant Prep opened its doors in 2018 with 39 Kindergarten and First Grade Scholars. Over the last four years we have experienced substantial growth, now serving 145 K-5 scholars. As an organization, we are committed to continuous improvement, and are inspired by the work of ensuring Allegiant Prep continues to grow responsibly over the next 7 years and beyond.

If granted the opportunity to join Phalen Leadership Academy (PLA), our staff, students, and families would benefit from a national network of supports, while affording us the autonomy to continue a smaller school feel focused on high expectations grounded in a way informed by the community that we serve.

#### **Rationale for Request:**

##### **Increase access to programming for students and families**

Over the last several years, we have been unable to consistently provide Tier 2 interventions due to lack of capacity. While we have been able to secure individuals to come in and provide these critical supports, it has not been as intentional as our scholars deserve. Reading Advantage is an example of a PLA program that provides Free In-School tutoring for scholars. The goal of this program is to deploy Reading Interventionists to Allegiant Prep to work with scholars to improve their reading skills and state testing proficiency.

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We know that when schools are intentional about including families in their scholar's education that our work can begin to be multiplied and a positive net impact can be felt at home and in the larger community. There is a huge opportunity for Allegiant Prep to provide resources and access to job training for adults. PLA University is an established program that would allow us to empower our families to further develop self-sufficiency while gaining access to upward economic mobility. This career training institution is one of a kind as it seeks to improve the outcomes of both PLA scholars and families. The program is free to PLA family and community members. It teaches life skills, job skills, and provides job certification training and placement.

**Provide access to network level supports to increase institutional expertise that will eliminate barriers and accelerate staff development and capacity**

PLA has been in operation since 2013, and through experience, has developed and refined best practices and frameworks that can be internalized and adopted by other schools to better execute on the mission and vision of the school. Below, you will find artifacts of the PLA model that APA staff would have access to for ongoing development and training. While APA has some of these processes in place and some that are more informal, leveraging PLA network and school-based supports will allow for enduring practices to be put in place that further extend the foundation of consistency and predictability established over the term of our first charter agreement.

- Instructional Review Process
- Leader and Teacher Evaluation Process
- Leader and Teacher Professional Learning
- Teacher Coaching Cycle Process
- New Teacher Mentorship Program
- Family Communication Process & Protocols

**Provide critical business and organizational supports that provide capacity and efficiency**

Phalen Leadership Academy operates in 6 states with over 1,200 staff, and programming that impacts over 8,000 scholars. PLA has been laser-focused on developing a national team that is able to provide a host of critical business and organizational supports that afford school-based staff the ability to focus on the most important work, providing a quality education to the children that we serve. Below, you will

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find supports that Allegiant Prep would be able to leverage by joining the Phalen Leadership Academy network.

- Human Resources
- Legal
- State Reporting and Compliance
- Network Hiring Support
- Network Enrollment Support
- Marketing/Communication

## **Grade Configuration Amendment**

As a part of our slow-growth model Allegiant Prep Academy opened its doors in 2018 with K-1 and has added one grade each year. A handful of factors, including identifying a facility late in the Summer of 2018 and not having human capital, or resources to fully execute a robust enrollment initiative contributed to our size in year one. But, a commitment to ensuring scholars are safe and learning within a joyful yet predictable learning environment have contributed to a 300% increase in enrollment over the last three years.

### **Rationale for Request:**

Allegiant Prep Academy is committed to ensuring more scholars continue to have access to an elementary education that will afford them the opportunity to excel in school and life. With this being said, amending our next Charter Agreement to reflect K-5 instead of K-8 would allow us to accomplish the objectives below.

### **Objective 1**

#### **Build out K-5 Enrollment:**

We currently serve K-5, with less than half of our grade levels serving two sections, we are confident we can continue to add a section in our Upper Academy (3-5) each year for the next several years until we have a total student enrollment of 250 (K-5, 27-28 SY).

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## **Objective 2**

### **Increase Proficiency Levels:**

Our current cohort of 5<sup>th</sup> Graders is the smallest in our school, with over half enrolling within the last two years, arriving to APA on average at least two years behind. In addition to lost, and compromised learning time during the Pandemic this group of scholars has the greatest opportunity for growth this year. With the adoption of a comprehensive standard aligned ELA Curriculum, a full team to implement our instructional model and more teachers with classroom experience we are confident that moving forward, state testing proficiency rates will continue to increase year over year.

## **School Location**

### **Rationale for Request:**

In the Allegiant Prep Academy Charter Application submitted to the Indiana Charter School Board in 2017 the Mission and Vision section identified the 46222 Zip Code as the desired area the school would be located in. APA has been fortunate to of found a building in the Haughville Neighborhood (46222 Zip Code) that we have had the humble privilege of calling home for the last several years. Due to growth, we will no longer be able to occupy our current location as is during the 23-24 School Year. Allegiant Prep is currently working with a community partner in the Haughville neighborhood to convert a former church (less than two miles away from our current location) into a space that will allow us to grow over the next several years (22,000 SF), while also affording the school more non-classroom space for staff, scholars and families.

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# **Attachment 1: Five-year Pro-forma budget**

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# Instructions for Renewal Budget Projections Workbook

☐ = Information should be entered into light gray shaded cells.

**Name of Charter School:** Allegiant Prep Academy

**Location:** Indianapolis Public Schools

**First Year of New Charter (Renewal Year):** 2023 - 24 SY

<a href="#">1. Instructions</a>	<ul style="list-style-type: none"> <li>• All organizers submitting a Charter Renewal Application to the Indiana Charter School Board must complete worksheets 1 through 4 of the Renewal Budget Projections Workbook. No information is required to be entered into WHITE cells, they will autofill as information is entered into GREY cells.</li> <li>• Column and Row references in these instructions are to the Excel spreadsheet Column or Row.</li> </ul>
<a href="#">2. Enrollment Projection</a>	<ul style="list-style-type: none"> <li>• Please complete the enrollment table for the school's current year, and provide enrollment projections for the next five (5) years beginning with the Renewal Year.</li> <li>• Please provide a list of administrative, instructional, and other staff along with estimates of proposed salaries and benefits. Please include both full and part-time employees and contractors. Projected salary and benefits should align with current and 5-Year budgets.</li> <li>• The estimated "average salary" for each position should include all taxable amounts (including taxable fringe benefits, stipends, bonuses, awards, and allowances).</li> <li>• "Other Insurance" includes health care, long-term care, life, disability.</li> <li>• "Other Benefits" are non-taxable benefits (e.g., educational assistance, dependent care assistance, transportation benefits, non-taxable fringe benefits, etc.).</li> </ul>
<a href="#">3. Staffing Plan</a>	
<a href="#">4. 5-Year Budget</a>	<ul style="list-style-type: none"> <li>• Please provide budget projections for the Current Year and the next 5 years. Note that the information provided in Tab 3 must align with the personnel expenses provided in Tab 4 or Tab 4 will throw an ERROR.</li> </ul>
Notes:	<ul style="list-style-type: none"> <li>• Applicants proposing to operate a network of schools should add a worksheet or attach a separate file reflecting the consolidated network's 5-Year pro-forma budget, reflecting all components - including the regional back office/central office - of the Indiana network.</li> <li>• This template is not intended to be exhaustive. If it is unclear to which line a particular item of revenue or expense belongs, add it to the closest approximation or to one of the "other" categories and make a note in the budget narrative.</li> </ul>



(must align with Renewal Application Enrollment Plan)

**Allegiant Prep Academy**

Indianapolis Public School

2023 - 24 SY

No

**Do not complete Row 32.**

Enrollment	Current Year	Year 1	Year 2	Year 3	Year 4	Year 5
	2022 - 23 SY	2023 - 24 SY	2024 - 25 SY	2025 - 26 SY	2026 - 27 SY	2027 - 28 SY
Kindergarten	36	38	44	48	48	50
Grade 1	25	30	34	36	44	46
Grade 2	36	28	30	34	36	40
Grade 3	18	34	32	36	38	40
Grade 4	21	20	32	36	38	40
Grade 5	9	20	22	32	34	34
Grade 6						
Grade 7						
Grade 8						
Grade 9						
Grade 10						
Grade 11						
Grade 12						
<b>Total K-12 Enrollment:</b>	<b>145</b>	<b>170</b>	<b>194</b>	<b>222</b>	<b>238</b>	<b>250</b>
Adult Learners (1)						
<b>Total Adult Enrollment:</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
Special Education	15%	15%	15%	15%	15%	15%
English Learners						
Students with Disabilities	95%	95%	95%	95%	95%	95%
Virtual Students (2)						
<b>K-12 Distribution (3)</b>	<b>\$ 1,116,565.98</b>	<b>\$ 1,309,077.35</b>	<b>\$ 1,493,888.27</b>	<b>\$ 1,709,501.01</b>	<b>\$ 1,832,708.29</b>	<b>\$ 1,925,113.75</b>
<b>Adult Distribution (4)</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>

Please complete the enrollment table for the school's current year, and provide enrollment projections for the next five (5) years beginning with the Renewal Year.

1) An "adult high school" is a charter school that has a majority of enrolled students that: (1) belong to a graduation cohort that has already graduated; or (2) are over the age of eighteen (18) years of age; at the time the student was first enrolled at the school. If you are an adult high school, complete boxes 32, and 37-40 only.

2) A "virtual student" is defined as a student for whom at least fifty percent (50%) of the instructional services received from the school is virtual instruction. Virtual instruction means instruction that is provided in an interactive learning environment created through technology in which students are separated from their teacher by time or space, or both. Students receiving more than 50% of their instruction virtually generate eighty-five percent (85%) of the foundation formula amount rather than 100%. The analysis is applicable on a per student basis.

3) The "basic" tuition support grant for K-12 schools is equal to the following formula:

$$(\text{Foundation Amount} \times \text{ADM}) - ((\text{Complexity Multiplier} \times \text{Complexity Index}) \times \text{ADM})$$

The Distribution calculations are an estimate based on projected enrollment multiplied by basic tuition support in the amounts as set forth in the most recently passed (2021-23 FY) Budget- Foundation = \$5,996 for the 2021-22 SY and \$6,235 for the 2022-23 SY (and beyond) and Complexity Multiplier = \$3,775. The school's actual distribution will be based on the school's ADM count of eligible pupils enrolled in the school on two count dates (in September and February) multiplied by the basic tuition support calculation. The calculation uses the Complexity Index for the school corporation in which the proposed charter school will be located. The school's actual Complexity Index amount will likely differ. The Special Education Grant amount is calculated on Tab A and uses the grant amount for mild/moderate disabilities (\$2,657 for the 2022-23 SY). The grant amount for severe disabilities is \$10,575 for the 2022-23 SY).

4) The Adult Learner Grant amount for adult high schools is \$6,750. The Adult Distribution is calculated by multiplying Total Enrollment by the Adult Grant.

**Notes & Instructions**

Please complete the enrollment table for the school's current year, and provide enrollment projections for the next five (5) years beginning with the Renewal Year.

1) An "adult high school" is a charter school that has a majority of enrolled students that: (1) belong to a graduation cohort that has already graduated; or (2) are over the age of eighteen (18) years of age; at the time the student was first enrolled at the school. If you are an adult high school, complete Rows 32, and 37-40 only.

21. A virtual student<sup>2</sup> is a student for whom at least fifty percent (50%) of the instructional services received from the school is virtual instruction. Virtual instruction means instruction that is provided in an interactive learning environment created through technology in which students are separated from their teacher by time or space or both. Students receiving more than 50% of their instruction virtually generate eighty-five percent (85%) of the foundation formula amount rather than 100%. The analysis is applicable on a per student basis.

3) The "basic" tuition support grant for K-12 schools is equal to the following formula:

$$(\text{Foundation Amount} \times \text{ADM}) + ((\text{Complexity Multiplier} \times \text{Complexity Index}) \times \text{ADM})$$

The Distribution calculations are an estimate based on projected enrollment multiplied by basic tuition support in the amounts as set forth in the most recently passed (2021-23 FY) budget. Foundation = \$5,995 for the 2021-22 SY and \$6,235 for the 2022-23 SY (and beyond) and Complexity Multiplier = \$3.75. The school's actual distribution will be based on the school's AOM count of eligible pupils enrolled in the school on two count dates (in September and February) multiplied by the basic tuition support calculation. The calculation uses the Complexity Index for the school corporation in which the proposed charter school will be located, the school's actual Complexity Index amount will likely differ. The Special Education Grant amount is calculated on Tap 4 and uses the grant amount for mild/moderate disabilities (\$26,657 for the 2022-23 SY). The grant amount for severe disabilities is \$10,575 for the 2022-23 SY.

4) The Adult Learner Grant amount for adult high schools is \$6,750. The Adult Distribution is calculated by multiplying Total Enrollment by the Adult Grant.

- Complete all relevant GSA Shaded areas -> Name of Position, Number of Positions, Average Salary, Health Insurance, Retirement Contribution, and Other Benefits
- Projected salary and benefits should align with Year 0 and 5 Year budgets.
- Please see footnotes below for additional information before completing the worksheet

Summary	
	Current Year
Total Staff	14.0
Total Salaries	\$ 81,000.00
Total Benefits	\$ 176,650.50
Total Salaries + Benefits	\$ 987,650.50
Student/teacher ratio	10:1
Student/staff ratio	20:1

  

Year 1	
Total Staff	17.0
Total Salaries	\$ 951,120.00
Total Benefits	\$ 229,118.68
Total Salaries + Benefits	\$ 1,180,238.68
Student/teacher ratio	10:1
Student/staff ratio	18:1

  

Year 2	
Total Staff	20.0
Total Salaries	\$ 1,155,762.40
Total Benefits	\$ 275,311.91
Total Salaries + Benefits	\$ 1,431,074.31
Student/teacher ratio	15:1
Student/staff ratio	28:1

  

Year 3	
Total Staff	23.0
Total Salaries	\$ 1,380,435.22
Total Benefits	\$ 316,548.68
Total Salaries + Benefits	\$ 1,696,983.90
Student/teacher ratio	16:1
Student/staff ratio	25:1

  

Year 4	
Total Staff	31.0
Total Salaries	\$ 1,900,035.03
Total Benefits	\$ 344,735.65
Total Salaries + Benefits	\$ 1,711,900.38
Student/teacher ratio	17:1
Student/staff ratio	26:1

  

Year 5	
Total Staff	33.0
Total Salaries	\$ 2,100,401.00
Total Benefits	\$ 353,229.50
Total Salaries + Benefits	\$ 1,717,797.50
Student/teacher ratio	18:1
Student/staff ratio	28:1

will be done and how it will be done. This is an important consideration because employees' wages are subject to independent contractor classification. If the IRS rules that an individual is an employee or independent contractor, the consequences can be significant. For example, if an individual is classified as an independent contractor, the IRS may have the right to control or direct the individual's work, which could result in the individual being classified as an employee. If an individual is classified as an employee, the employer may be subject to additional taxes and penalties. Therefore, it is important to consult with a tax professional to ensure that the classification is correct. A substantial test should be considered to be an employee and not an independent contractor. Misclassification of an employee as an independent contractor may result in additional payroll taxes, fines, and penalties. The IRS may also require the employer to pay back taxes and penalties. Therefore, it is important to consult with a tax professional to ensure that the classification is correct. An independent contractor should be listed in "Other Compensation" on Row 3, and explained in the budget narrative. Do not include payments made to independent contractors on lines 15-17.

1. **Amounts paid to an employee** – regardless of whether they are full-time, part-time, or limited-time – should be listed in the **Average Salary** column (lines 15-17) for each year. Any payment to an employee to service performed should be included, including salaries, vacation allowances, bonuses, stipends, commissions, and variable fringe benefits, for example, see <http://www.irs.gov/efile/efile0315>.
2. **Health Insurance** includes Group Life Insurance, Group Health Insurance, Group Accident Insurance, Other Voluntary Group Insurance, and Workers Compensation Insurance.
3. **Retirement Contributions** includes Service(s) Only Retirement Pay, Public Employees Retirement Fund, Teachers Retirement Fund, Public Employees Retirement Fund (Optional Contribution), Teachers Retirement Fund (Optional Contribution), Teachers Retirement Fund (Optional Contribution), and Other Compensation. Includes any other benefits not otherwise classified above, including payments made to independent contractors. This cell should reflect the sum total of all Other Compensation for the year.
4. **Other Compensation** includes any other benefits not otherwise classified above, including payments made to independent contractors. This cell should reflect the sum total of all Other Compensation for the year.







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# **Attachment 2: Budget Narrative**

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APA has had a strong history of budgeting and managing its finances through a slow growth start-up. APA works closely with the Center for Innovative Education Solutions (CIES) in our budgeting and reporting processes. APA school leadership, APA's finance committee, and APA's full board all work together with CIES to project and adapt the budget as enrollment targets and other circumstances evolve each year. APA meets standard across the ICSB financial accountability metrics and anticipates continuing to do so. It took three years to get to a stable financial position and we expect that position to continue to solidify in the future. Our conservative approach to budgeting is one of the reasons we expect to continue our success. Below are the major assumptions that drive our five-year budget projections.

### **State and Federal Funding**

We are projecting flat funding on a per student basis over the next five years. Realistically, we anticipate a 2-3% annual growth in per student funding, but our plans do not factor that in. The one adjustment to federal funding is that we recognize that ESSER funding is temporary. Our projections show a dip in federal funding as we phase out the use of ESSER dollars over the current year and next fiscal year.

### **Other Funding**

We expect to continue our track record of securing other grant funds, as we have in our history. However, we are not including fundraising in our projections. We anticipate that other various sources of funding will continue flat on a per student basis over the next five years.

### **Staffing Costs**

Our staffing structure is detailed in the budget worksheet provided. Our staffing plan assumes 2% annual increases in salaries. We will continue to manage our overall staffing costs based on the resources available to us. Our expectation is to provide more than a standard 2% increase in salaries. That will be accomplished through additional revenue and through managing total staffing numbers and staff turnover. Again, our revenue projections are conservative with no per student increases over five years. If there are increases, those will be used to fund salaries.

### **Facility**

**Allegiant Prep Academy** educates all students in grades K-8 with rigorous academics, character development, and a commitment to community necessary for college success and a life of positive action.



This is the largest non-staff cost and the most important to manage for our long-term financial health. Our first five years have been helped significantly by a favorable lease arrangement. As we currently stand in negotiations, we are anticipating another favorable lease. We have outlined those assumptions on the budget worksheet. Securing a financially responsible lease allows us to manage our resources to better support our people.

### **Other Expenses**

We have a history of managing expenses well and we've built a financial history that allows us to project our expenses reasonably well. We have used excess resources in our early years to purchase supplies, curriculum, furniture, technology, and other items we need as we grow. We feel well-stocked for our growth. As a standard assumption, we anticipate service costs to grow at 2% and variable costs to be flat on a per student basis. We will manage within the resources we have.

### **Enrollment**

Enrollment is the primary driver of our resources and resource needs. Our enrollment assumptions are detailed in the second tab of our Renewal Budget Workbook (Attachment 1).

**Allegiant Prep Academy** educates all students in grades K-8 with rigorous academics, character development, and a commitment to community necessary for college success and a life of positive action.





**ALLEGiant PREP**  
ACADEMY

# **Attachment 3:**

# **Statement of Assurances**

**Allegiant Prep Academy** educates all students in grades K-8 with rigorous academics, character development, and a commitment to community necessary for college success and a life of positive action.

Exhibit C

**Statement of Assurances**

The charter school agrees to comply with the following provisions: (*Read and check*)

- ☒ 1. A resolution or motion has been adopted by the charter school applicant's governing body that authorizes the submission of this application, including all understanding and assurances contained herein, directing and authorizing the applicant's designated representative to act in connection with the application and to provide such additional information as required.
- ☒ 2. Recipients operate (or will operate if not yet open) a charter school in compliance with all federal and state laws, including Indiana Charter Schools Law as described in all relevant sections of IC § 20-24.
- ☒ 3. Recipients will, for the life of the charter, participate in all data reporting and evaluation activities as required by ICSB and IDOE. See in particular IC § 20-20-8-3 and relevant sections of IC § 20-24.
- ☒ 4. Recipients will comply with all relevant federal laws including, but not limited to, the *Age Discrimination in Employment Act* of 1975, Title VI of the *Civil Rights Act* of 1964, Title IX of the *Education Amendments* of 1972, section 504 of the *Rehabilitation Act* of 1973, Part B of the *Individuals with Disabilities Education Act*, and section 427 of the *General Education Provision Act*.
- ☒ 5. Recipients will comply with all provisions of the Non regulatory Guidance—Public Charter Schools Program of the U.S. Department of Education, which includes the use of a lottery for enrollment if the charter school is oversubscribed, as well as with applicable Indiana law. See also relevant sections of IC § 20-24.
- ☒ 6. Recipients shall ensure that a student's records, and, if applicable, a student's individualized education program as defined at 20 U.S.C. § 1401(14) of the *Individuals with Disabilities Education Act*, will follow the student, in accordance with applicable federal and state law.
- ☒ 7. Recipients will comply with all provisions of the *Elementary and Secondary Education Act* of 1965, as amended by the *Every Student Succeeds Act* of 2015 ("ESSA"), including but not limited to, provisions on school prayer, the Boy Scouts of America Equal Access Act, the Armed Forces Recruiter Access to Students and Student Recruiting Information, the Unsafe School Choice Option, the Family Educational Rights and Privacy Act ("FERPA") and assessments.
- ☒ 8. Recipients will operate with the organizer serving in the capacity of fiscal agent for the charter school and in compliance with generally accepted accounting principles.
- ☒ 9. Recipients will at all times maintain all necessary and appropriate insurance coverage.



- ☒ 10. Recipients will indemnify and hold harmless ICSB, the State of Indiana, all school corporations providing funds to the charter school (if applicable), and their officers, directors, agents and employees, and any successors and assigns from any and all liability, cause of action, or other injury or damage in any way relating to the charter school or its operation.
- ☒ 11. Recipients understand that ICSB may revoke the charter if ICSB deems that the recipient is not fulfilling the academic goals, fiscal management, or legal and operational responsibilities outlined in the charter.

I, the undersigned, am an authorized representative of the charter school applicant and do hereby certify that the information submitted in this application is accurate and true to the best of my knowledge and belief. In addition, I do hereby certify to the assurances contained above.

Rick Anderson

Name

[Signature]  
Signature

10/20/22

Date